



## INTRODUCTION

On an annual basis, the City of San José's Development Service Partners<sup>1</sup> (Partners) collectively respond to 160,000 phone inquiries at the Development Center, process 700 planning applications, issue 33,000 building permits, and conduct 190,000 field inspections. As part of its commitment to provide high quality services that meet the needs of its customers, the Development Services program has sought to measure customer satisfaction and gain insight into how services can be improved through several feedback mechanisms. In addition to informal verbal and written feedback, for several years the Program has attempted to measure customer satisfaction through unscientific mail and E-mail surveys made available to customers at several key milestones in the development process.

Although all of these feedback mechanisms are valuable sources of information for the Partners in that they provide timely and accurate information about the opinions of specific customers, they do not necessarily provide an accurate picture of the Development Services program customer base as a whole. For the most part, the methods rely on the customer to initiate the feedback. Consequently, the methods suffer from what is known as a self-selection bias—the Partners receives feedback only from those customers who are motivated enough to initiate the feedback process. Moreover, these customers tend to be those who are either very pleased or very displeased with the service they have received. Their collective opinions are thus not necessarily representative of the program's customer base as a whole.

The motivation for the current study was to design and employ a methodology that would avoid the self-selection bias noted above and thereby provide statistically reliable measures of customer satisfaction among the Program's customer base.

**OVERVIEW OF METHODOLOGY** Customers form their overall opinions about a product or service based on a number of specific factors. Collectively, these factors shape customer satisfaction—and therefore can also be thought of as *key drivers* of customer satisfaction. The first step to providing excellent customer service is thus to understand *which* factors shape customers' opinions about the services provided by the Development Services Partners, as well as how customers prioritize the factors/drivers when forming their opinions of the Partners' performance.

The research framework for this study was originally developed by True North in 2006 and proceeded in two phases. During the design stage of the study, True North discussed performance issues with City staff, reviewed past survey findings, and considered relevant findings from similar studies conducted with Development Services Departments from other cities to identify potential key drivers of customer satisfaction. Having identified the potential key drivers of customer satisfaction, True North subsequently designed two versions of a customer survey to measure customers' opinions and experiences on each of the key dimensions. Two versions of the questionnaire were created to accommodate the differences between ministerial and discretionary projects. As long as they comply with the Municipal Code, *ministerial* projects do not require a public hearing and are approved administratively by the City (e.g., electrical panel upgrade). In

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1. The City's Development Services Partners include the Planning Division, Building Division, Public Works Department, and Bureau of Fire Prevention.



contrast, a *discretionary* project requires a public hearing (e.g., conditional use permit, zoning change). Even if the project complies with the Municipal Code, the decision-makers still have some discretion in deciding whether to approve the project.

The questionnaires and interviewing protocol used for the 2007 study are nearly identical to those first employed in 2006. A total of 1,000 randomly selected customers who were associated with at least one permit between January 1, 2007 and December 31, 2007 participated in the study via telephone or online at a secure website hosted and managed by True North. Data were collected between January 17 to February 12, 2008. The telephone interviews averaged 14 minutes for ministerial customers, 13 minutes for discretionary customers. A full description of the methodology used for the survey is included later in this report (see *Questionnaires & Toplines* on page 80).

**STATISTICAL SIGNIFICANCE** As noted above, this is not the first statistically reliable customer satisfaction study conducted for the Development Services Department. A similar study was first developed and administered in 2006. Because there is a natural interest in tracking the Department's performance in meeting the evolving needs of its customers, where appropriate the results of the 2007 study are compared with the results of identical questions used in the 2006 surveys. In such cases, True North conducted the appropriate tests of statistical significance to identify changes that likely reflect actual changes in customer opinion between 2006 and 2007—as opposed to being due to chance associated with selecting two samples independently and at random. Differences between the two studies are identified as *statistically significant* if we can be 95% confident that the differences reflect an actual change in customer opinion between the two studies. Statistically significant differences within response categories over time are denoted by the † symbol which appears in the figure next to the appropriate response value.

**ORGANIZATION OF REPORT** This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the sections titled *Just the Facts* and *Conclusions* are for you. They provide a summary of the most important factual findings of the survey in bullet-point format and a discussion of their implications. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the survey by topic area (see *Table of Contents*), as well as a description of the methodology employed for collecting and analyzing the data. And, for the truly ambitious reader, the questionnaires used for the interviews are contained at the back of this report, a complete set of crosstabulations is contained in Appendix A, and a complete list of verbatim responses (gathered from Question 16 of the ministerial version and Question 15 of the discretionary version) is contained in Appendix B.

**ACKNOWLEDGEMENTS** True North would like to thank the staff at the City of San José who contributed their valuable input during the design stage of this study. Their expertise, insight and local knowledge improved the overall quality of the research presented here.

**DISCLAIMER** The statements and conclusions in this report are those of the authors (Dr. Timothy McLarney and Richard Sarles) at True North Research, Inc. and not necessarily those of the City of San José's Development Services Partners. Any errors and omissions are the responsibility of the authors.



**ABOUT TRUE NORTH** True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, perceptions, priorities and concerns of their constituents and customers. Through designing and implementing scientific surveys, focus groups and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, organizational development, establishing fiscal priorities, and developing effective communication campaigns.

During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 400 survey research studies for public agencies—including more than 250 studies for California municipalities and special districts.





## JUST THE FACTS

The following is an outline of the main factual findings from the survey. For the reader's convenience, we have organized the findings according to the section titles used in the body of this report. Thus, if you would like to learn more about a particular finding, simply turn to the appropriate report section.

### PROCESS, ROLE & PROJECT TYPE

- Just over one-third (37%) of **ministerial**<sup>2</sup> customers surveyed were personally involved in all three stages of the permitting process on their most recent project—permit application and issuance, plan check, and building inspection. An additional 44% of customers were involved in two of the three stages, whereas a minority of customers (19%) were personally involved in just one of the key stages on their most recent project.
- Fifty-two percent (52%) of **discretionary** customers surveyed were personally involved in all three stages of their most recent project—permit application, plan review and public hearing. An additional 33% of customers were involved in two of the three stages, whereas 16% of discretionary customers were personally involved in only one of the key stages on their most recent project.
- Over three-quarters (77%) of **discretionary** customers in 2007 reported that they personally worked with a Project Manager assigned by the City on their most recent project.
- When **ministerial** customers were asked to describe their role on their most recent project, 41% selected contractor, 23% mentioned owner, 20% mentioned architect, and 19% chose agent or representative. Approximately 14% described their role as engineer, 10% as permit runner, and 4% indicated that their role was something 'other' than the options previously mentioned.
- The most common role among **discretionary** customers was agent or representative (25%), followed by architect (21%), and contractor (20%). Fourteen percent (14%) described their role as engineer, 11% as planner, 10% served as a permit runner, and 8% indicated that their role was something other than the previously mentioned options.
- Among **ministerial** customers, 54% described their most recent project as commercial, 39% described it as residential in nature, 5% described it as mixed-use, and 1% were not sure.
- **Discretionary** customers were most likely to describe their most recent project as residential (45%). Approximately 38% described their project as commercial, 17% indicated that it was a mixed-use project, and 1% were not sure.
- When **ministerial** customers were asked to further describe the nature of their project, the dominant category among *residential* projects in 2007 was remodel or addition (55%), followed by new construction (21%). For *commercial* projects, half of ministerial customers described the project as a tenant improvement (50%) in 2007, whereas 18% selected new construction.

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2. As long as they comply with the Municipal Code, *ministerial* projects do not require a public hearing and are approved administratively by the City (e.g., electrical panel upgrade). In contrast, a *discretionary* project requires a public hearing (e.g., conditional use permit, zoning change). Even if the project complies with the Municipal Code, the decision-makers still have some discretion in deciding whether to approve the project.



## OVERALL SATISFACTION

- Overall, nearly four out of five **ministerial** customers (79%) in 2007 indicated that they were either very (45%) or somewhat (34%) satisfied with the service that they received from the Development Services Partners on their most recent project. Twenty percent (20%) of respondents indicated that they were dissatisfied with the Partners' performance, and 1% were unsure.
- More than two-thirds of **discretionary** customers (68%) indicated that they were either very (37%) or somewhat (31%) satisfied with the service that they received on their most recent project in 2007. Less than one-third (31%) of respondents indicated that they were dissatisfied with the Partners' performance, and approximately 1% were unsure.

## PERMIT APPLICATION & ISSUANCE

- Eighty-nine percent (89%) of **ministerial** customers indicated that they were personally involved in the permit application and issuance stage on their most recent project.
- More than 85% of **ministerial** customers agreed that staff at the permit counter were courteous (95%), accessible (91%), helpful (91%), responsive (90%), knowledgeable (87%), and made an effort to understand their needs as a customer (89%).
- The vast majority of **ministerial** customers also agreed that they received a clear explanation of the fees, taxes and deposits (79%), that the fees and taxes were assessed accurately (84%), and that the wait time at the permit counter before being assisted by staff was reasonable (88%).
- **Ministerial** customers were also generally satisfied with staff's efforts to communicate the process and steps needed to obtain a permit (80%), and provide clear, correct instructions about the documents needed to apply for a permit (83%).
- Overall, 85% of **ministerial** customers in 2007 indicated that they were satisfied with the service they received during the permit application stage on their most recent project.
- Eighty-nine percent (89%) of **discretionary** customers indicated that they were personally involved in the permit application stage on their most recent project.
- At least 75% of **discretionary** customers agreed that staff at the permit counter were courteous (93%), accessible (89%), helpful (85%), responsive (86%), knowledgeable (78%), and made an effort to understand their needs as a customer (87%).
- More than 80% of **discretionary** customers also agreed that the wait time at the permit counter before being assisted by staff was reasonable (86%), and that the fees were assessed accurately (82%).
- When compared to the other performance dimensions tested, communication received the lowest satisfaction scores from **discretionary** customers—including communicating the process and steps needed to obtain a permit (76%), providing clear, correct instructions about the documents needed to apply for a permit (73%), and providing a clear explanation of the fees (76%).
- Overall, 78% of **discretionary** customers indicated that they were satisfied with the service they received during the permit application stage on their most recent project.



## PLAN CHECK & PLAN REVIEW

- Seventy-nine percent (79%) of **ministerial** customers reported they were personally involved in the plan check stage of their most recent project.
- At least 80% of **ministerial** customers agreed that plan check staff were courteous (94%), knowledgeable (90%), helpful (89%), responsive (85%), and made an effort to understand their needs as a customer (82%).
- A similarly high percentage of **ministerial** customers also agreed that plan check comments were clear and understandable (87%), were based on the code (84%), were consistent (82%), made sense for the project (81%), and the number of plan rechecks was reasonable (83%).
- When compared to the other performance dimensions tested, **ministerial** customers expressed somewhat lower levels of satisfaction with the timing of plan correction requests (80%), the reasonableness of the turn-around time set by the City for plan check (75%), the City's performance in meeting the target date set for completing plan check (75%), and the adequacy of communication between city staff about the project during plan check (79%).
- Overall, 80% of **ministerial** customers indicated that they were satisfied with the service they received during the plan check stage.
- Ninety percent (90%) of **discretionary** customers reported they were personally involved in the plan review stage of their most recent project.
- At least two-thirds of **discretionary** customers agreed that plan check staff were courteous (89%), knowledgeable (73%), helpful (74%), responsive (73%), and made an effort to understand their needs as a customer (73%).
- Although at least two-thirds of **discretionary** customers also felt that plan review comments were clear and understandable (72%), were based on the code (70%), and the number of plan rechecks was reasonable (72%), fewer perceived that the comments and corrections made sense for the project (66%), and that the comments and corrections were consistent (56%).
- **Discretionary** customers expressed the lowest levels of satisfaction with the timing of plan correction requests (53%), the reasonableness of the turn-around time set by the City for plan review (60%), the City's performance in meeting the target date set for completing plan review (52%), and the adequacy of communication between city staff about the project during plan review (60%).
- Overall, 66% of **discretionary** customers indicated that they were satisfied with the service they received during the plan review stage.

## PROJECT MANAGER

- Seventy-seven percent (77%) of **discretionary** customers indicated they personally worked with a Project Manager assigned by the City on their most recent project.
- At least three-quarters of **discretionary** customers agreed that the Project Manager was courteous (92%), knowledgeable (77%), helpful (81%), and responsive (74%).
- More than two-thirds of **discretionary** customers also agreed that the Project Manager communicated clearly regarding the process and steps needed to get to a public hearing (72%),



that once all of the documents were ready, the Project Manager scheduled the hearing within a reasonable amount of time (76%), the Project Manager provided reasonable estimates of the processing costs throughout the project (71%), and that the project comment letter was accurate and complete (69%).

- Overall, 72% of **discretionary** customers indicated that they were satisfied with the service they received from the Project Manager on their most recent discretionary project.

## PUBLIC HEARING

- Sixty percent (60%) of **discretionary** customers indicated they were personally involved in the public hearing stage on their most recent project.
- Approximately 85% of **discretionary** customers agreed that staff represented their project in a fair, professional manner (89%), that the decision-makers were fair in how they made their decisions (86%), and that they were given adequate information by staff about how the public hearing process would go (89%).
- Over 80% of **discretionary** customers perceived that the item was heard within a reasonable amount of time at the public hearing (84%), that the appeal process is fair and reasonable (82%), that they were given adequate time to review permits and resolutions prior to the public hearing (84%), and that the Public Outreach process is fair and reasonable (83%).
- A slightly smaller proportion of **discretionary** customers indicated that the project comment letter provided clear and correct instructions about the documents needed before a public hearing could be scheduled (78%).
- Overall, 82% of **discretionary** customers indicated that they were satisfied with the service they received during the public hearing stage.

## BUILDING INSPECTIONS

- Nearly half (49%) of **ministerial** customers indicated they were personally involved in the inspection stage on their most recent project.
- The vast majority of **ministerial** customers agreed that inspectors arrived on-time for scheduled appointments (88%) and were courteous (94%), responsive (89%), knowledgeable (92%), helpful (90%), and made an effort to understand their needs as a customer (84%).
- Although eight out of ten **ministerial** customers agreed that written notices and corrections were clear and understandable (89%) and that inspectors only requested a change if it was required to meet code (82%), the levels of agreement were somewhat lower with respect to the perceived consistency of notices and corrections issued by different inspectors on the project (74%), the consistency of inspectors' comments with those of plan check staff (78%), and that changes were requested only if they made sense for the project (78%).
- Overall, 85% of **ministerial** customers agreed that they were satisfied with the service they received during the inspection stage of the process.



## FIRE DEPARTMENT

- Forty-one percent (41%) of **ministerial** customers surveyed indicated that they had received permit, project review, or inspection services from San José's Fire Department in the six months prior to the interview. The corresponding figure among **discretionary** customers was 56%.
- At least 90% of **ministerial** customers agreed that Fire Department staff were courteous (97%), knowledgeable (96%), helpful (95%), responsive (92%), and made an effort to understand their needs as a customer (94%).
- At least 85% of **ministerial** customers also agreed that the wait time at the permit counter before being assisted by Fire Department staff was reasonable (93%), that plan review comments and corrections were clear and understandable (88%), and that plan review comments and corrections were consistent (87%).
- When compared to the other dimensions tested, **ministerial** customers expressed slightly lower levels of satisfaction with respect to timeliness of performance and certain aspects of communication—including communication/coordination between Departments during plan review (78%), communication regarding the process and steps needed to obtain a clearance or permit (84%), the reasonableness of the turn-around time set for plan review (82%), and the completion of the plan review process by the target date set by the Fire Department (84%).
- Overall, 90% of **ministerial** customers indicated that they were satisfied with the service they received from the Fire Department.
- At least 80% of **discretionary** customers agreed that Fire Department staff were courteous (94%), knowledgeable (89%), helpful (90%), responsive (84%), and made an effort to understand their needs as a customer (86%).
- Although at least 80% of **discretionary** customers also agreed that the wait time at the permit counter before being assisted by Fire Department staff was reasonable (91%) and that plan review comments and corrections were clear and understandable (83%), a smaller percentage agreed that plan review comments and corrections were consistent (76%).
- **Discretionary** customers generally expressed somewhat lower levels of satisfaction with respect to timeliness of performance and certain aspects of communication—including communication/coordination between Departments during plan review (69%), communication regarding the process and steps needed to obtain a clearance or permit (79%), the reasonableness of the turn-around time set for plan review (78%), and the completion of the plan review process by the target date set by the Fire Department (79%).
- Overall, 81% of **discretionary** customers indicated that they were satisfied with the service they received from the Fire Department.



## PUBLIC WORKS DEPARTMENT

- Twenty-one percent (21%) of **ministerial** customers surveyed indicated that they had received permit, project review, or inspection services from San José's Public Works Department in the six months prior to the interview. The corresponding figure among **discretionary** customers was 47%.
- At least 80% of **ministerial** customers agreed that Public Works staff were courteous (93%), knowledgeable (89%), helpful (84%), responsive (84%), and made an effort to understand their needs as a customer (85%).
- At least three-quarters of **ministerial** customers also agreed that the wait time at the permit counter before being assisted by Public Works staff was reasonable (92%), that plan review comments and corrections were clear and understandable (83%), that plan review comments and corrections were consistent (76%), that the process and steps needed to obtain a clearance or permit were clearly communicated (80%), that the turn-around time set by the Public Works Department for plan review was reasonable (81%), and that the plan review process was completed by the target date set by the Public Works Department (80%).
- When compared to the other dimensions tested, **ministerial** customers expressed somewhat lower levels of satisfaction with respect to the communication/coordination between Departments during plan review (73%).
- Overall, 82% of **ministerial** customers indicated that they were satisfied with the service they received from the Public Works Department on recent projects.
- At least three-quarters of **discretionary** customers agreed that Public Works staff were courteous (91%), knowledgeable (82%), helpful (81%), responsive (77%), and made an effort to understand their needs as a customer (76%).
- Most **discretionary** customers also agreed that the wait time at the permit counter before being assisted by Public Works staff was reasonable (89%), that plan review comments and corrections were clear and understandable (67%), that plan review comments and corrections were consistent (59%), and that the process and steps needed to obtain a clearance or permit were clearly communicated (70%).
- When compared to the other dimensions tested, **discretionary** customers expressed somewhat lower levels of satisfaction with respect to the Public Works Department's completion of the plan review process by the target date (57%), the communication/coordination between Departments during plan review (53%), the consistency of plan review comments and corrections (59%), and the reasonableness of the turn-around time set by the Department for plan review (58%).
- Overall, 72% of **discretionary** customers indicated that they were satisfied with the service they received from the Public Works Department on recent projects.

## INFORMATION ACCESS

- More than three-quarters of **ministerial** customers indicated that they were either very satisfied (35%) or somewhat satisfied (44%) with the Partners' efforts to make information available to them through the Development Services website, brochures, and meetings.



- Approximately 62% of **ministerial** customers reported that they had visited the Development Services' website in the 12 months prior to the interview.
- Eighty-five percent (85%) of **ministerial** customers who had visited the Development Services' website indicated that they were satisfied with the content of the site.
- Approximately three-quarters of **discretionary** customers indicated that they were either very satisfied (29%) or somewhat satisfied (44%) with the Partners' efforts to make development services information available to them through the Development Services website, brochures, and meetings.
- Approximately three-quarters (74%) of **discretionary** customers reported that they had visited the Development Services' website in the 12 months prior to the interview.
- Eighty-five percent (85%) of **discretionary** customers who had visited the Development Services website reported that they were satisfied with the content of the site.

## SUGGESTIONS FOR IMPROVEMENT

- When **ministerial** customers were provided with an open-ended opportunity to suggest changes or improvements in the area of development services that they would most like the City to make, the most common response to this question among in 2007 was 'not sure' (22%), followed by none/everything is fine (18%). Among the specific improvements suggested, decreasing turnaround times (8%), improving online access to information (8%), and clarifying/standardizing/reducing fees (6%) were the top suggestions.
- When **discretionary** customers were provided with an open-ended opportunity to suggest changes or improvements in the area of development services that they would most like the City to make, the most common response to this question in 2007 was 'not sure' (19%), followed by none/everything is fine (14%). Among the specific improvements suggested, improving/simplifying the process (8%), improving intra-departmental communication (7%), and clarifying/standardizing/reducing fees (6%) were the top suggestions.

## PERCEPTIONS OF CITY

- At least three-quarters of **ministerial** customers generally agreed that the City of San José's Development Services Partners' care about their customers (85%), have improved customer service in the past 12 months (79%), and do an adequate job balancing the interests of developers with the interests of the communities that will be affected by a project (75%).
- Approximately two-thirds of **ministerial** customers perceived that the Partners' acknowledge a mistake when it has been made (66%), and do their best to fix a mistake when one occurs (71%).
- Approximately three-quarters of **discretionary** customers generally agreed that the City of San José's Development Services Partners' care about their customers (75%).
- Approximately two-thirds of **discretionary** customers agreed that the Partners do an adequate job balancing the interests of developers with the interests of the communities that will be affected by a project (69%), and have improved customer service in the past 12 months (68%).



- The proportion of **discretionary** customers who felt that the Partners' acknowledge a mistake when it has been made (58%) and do their best to fix a mistake when one occurs (65%) was somewhat lower.



## CONCLUSIONS

As noted in the *Introduction*, this study was designed to provide the City of San José's Development Services Partners with a statistically reliable understanding of customers' satisfaction, priorities and needs as they relate to services provided by the Program. In addition to providing the Partners with a means of measuring and tracking their performance, this study gathers information that can assist the Partners in making sound, strategic decisions in a variety of areas—including prioritizing service improvements and enhancements, planning, policy evaluation, staffing, training and budgeting.

Whereas subsequent sections of this report are devoted to conveying the detailed results of the survey, in this section we attempt to 'see the forest through the trees' and note how the collective results of the survey answer some of the key questions that motivated the research. The following conclusions are based on True North's interpretations of the 2007 survey results, comparisons to the 2006 survey results, as well as the firm's experience conducting similar studies for Development Services Departments in other California municipalities.

**HOW WELL IS DEVELOPMENT SERVICES PERFORMING OVERALL?** Considering that the Development Services Partners have a *regulatory* relationship with their customers and that they must balance the interests of developers with the interests of the communities that will be affected by a project, the results of the study indicate that the Partners are performing quite well in what are often difficult circumstances. Moreover, the results clearly indicate that the Partners have improved their performance in dozens of key service areas during the past year.

Better than three-quarters of ministerial customers and approximately two-thirds of discretionary customers indicated that they were generally satisfied with the Partners' performance in meeting their needs on their most recent projects in 2006. Not only did the overall levels of satisfaction increase for both customer groups in 2007, the *intensity* of satisfaction increased significantly among ministerial and discretionary customers. Indeed, whereas 39% of ministerial customers and 27% of discretionary customers indicated that they were *very* satisfied with the service they received on their most recent project in 2006, the corresponding values in 2007 were 45% and 37%, respectively.

The vast majority of ministerial and discretionary customers also perceived that the Partners' have improved their customer service in the past year, gave high marks to the Partners' efforts to communicate and make information available to customers, and indicated that the Partners do an adequate job balancing the interests of developers with the interests of the communities that will be affected by a project.



Perhaps most importantly, of the 34 specific service dimensions where customers noted a statistically significant difference in the Partners' performance in the past year (see Table 1 for a summary), 31 of the changes were in the positive direction. That is, the Partners improved their performance in 31 areas and declined in just three areas.



TABLE 1 SUMMARY OF SERVICE DIMENSIONS WITH SIGNIFICANT CHANGES IN 2007

Positive Performance Changes	
Discretionary	
Overall satisfaction: Service during most recent discretionary project	
Agreement: Coordination with other departments seamless	
Agreement: Process, steps needed for clearance or permit clearly communicated	
Ministerial	
Overall satisfaction: Service during most recent ministerial project	
Agreement: Staff at the permit application counter were knowledgeable	
Agreement: Overall, satisfied with permit application process	
Agreement: Permit application steps clearly communicated	
Agreement: Staff at the permit application counter were helpful	
Agreement: Permit application counter staff made effort to understand needs	
Agreement: Received clear, correct instructions about permit application documents	
Agreement: Wait time at office reasonable	
Agreement: Staff at the permit application counter were accessible	
Agreement: Staff at the permit application counter were responsive	
Agreement: Adequate communication among City staff during plan check	
Agreement: Plan check staff were responsive	
Agreement: Plan corrections were requested at the appropriate time	
Agreement: Plan check process was completed by target date	
Agreement: Plan check staff made effort to understand customer needs	
Agreement: Number of plan rechecks was reasonable	
Agreement: Plan check staff were helpful	
Agreement: Plan check staff were knowledgeable	
Agreement: Inspectors made effort to understand customer needs	
Agreement: Inspectors were helpful	
Agreement: Inspectors were knowledgeable	
Agreement: Written notices clear, understandable	
Agreement: Overall, satisfied with service received from Fire Department	
Agreement: Fire Department staff made effort to understand needs	
Agreement: Plan review process was completed by the target date	
Agreement: Wait time at counter reasonable	
Agreement: Turn-around time for plan review was reasonable	
Agreement: Wait time at counter reasonable	
Negative Performance Changes	
Discretionary	
Overall satisfaction: Information availability, accessibility	
Agreement: Plan review comments, corrections were consistent	
Agreement: Turn-around time for plan review was reasonable	

**WHERE ARE THE PARTNERS PERFORMING PARTICULARLY WELL?** Perhaps the most important recommendation—one that is occasionally overlooked in customer satisfaction research—is for the Partners to recognize the many things that they do well and to focus on continuing to perform at a high level in these areas. As noted throughout this report, customers were generally pleased with the Partners' performance in many areas—especially the courtesy, knowledge, responsiveness and helpfulness exhibited by Development Services staff. The Partners are also clearly on a path of improvement since 2006. The top priority for the Partners should thus be to do what it takes to maintain the high quality of services in areas where customers have come to expect the Partners to perform well.



For convenience, we have organized the following discussion according to the key drivers of customer satisfaction that are typically found among customers of Development Services Departments.<sup>3</sup> The areas where the Partners are currently performing particularly well include accessibility, responsiveness, staff competency and sufficiency, and attitude/culture.

**Accessibility** When customers need assistance from Development Services, they want to have reasonable access by phone, fax, Internet, E-mail and/or in-person (as appropriate) to the information and/or staff member who can resolve their issues. In general, customers gave the Development Services staff high marks for accessibility.

**Responsiveness** Customers want Development Services staff to be responsive to their needs. Wait time is one of the key aspects of responsiveness and refers to the time that customers actively wait at the counter, on the phone, or at a project site to receive service from staff on a particular issue. Long waits times on the phone, in-person, or when expecting a response from staff are frustrating for customers and should be avoided. The concept of wait time applies not only to the availability of personnel, but also to materials, records and decisions that must be made on a project for it to move forward.

The Department received mixed reviews with respect to responsiveness. On the positive side, the vast majority of customers indicated that the wait times at the permit application counter were reasonable, and ministerial customers gave increasingly high marks for responsiveness to inspectors, plan check staff, and to staff at the permit application counter. Among discretionary customers, however, a sizeable minority continued to indicated that plan review staff and project managers could be more responsive.

**Staff Competency and Sufficiency** The competency and number of staff directly affect many of the other factors identified in this report—such as communication, consistency and timeliness—so it is worth highlighting this factor as its own category. The bottom line is that customers expect Development Services to have a sufficient number of adequately trained staff who have the knowledge needed to help them resolve issues in an efficient manner.

Staff competency and sufficiency are areas where Development Services received consistently high marks. At least three-quarters of customers agreed that staff at the permit application, plan review *and* inspection stages were knowledgeable—and lack of staff was specifically mentioned as an issue by less than 3% of customers during the study. Ministerial customers also noted statistically significant improvement in the knowledge of staff at all three stages (permit counter, plan check, and inspections) since the baseline study in 2006.

It should be noted, however, that discretionary customers—especially those who were generally dissatisfied with the service they received on their most recent project—identified the need to increase staff’s general training and knowledge as being among their top suggestions for improvement. Moreover, to the extent that insufficient staff increases turnaround time for other tasks, it may be an area for improvement.

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3. True North has completed over 50 qualitative interviews and more than 6,000 survey interviews with customers of Development Services Departments in California. The key drivers of customer satisfaction discussed in this section are a subset of the most important drivers based on our collective experience working with San José’s Development Services Partners and similar departments in other cities.



**Attitude/Culture** A consistent theme of research among Development Services Departments is the importance that customers place on how they are treated by staff. The bottom line is that a good attitude on the part of staff appears to go a long way in terms of keeping a customer satisfied as they navigate what is a complex and, at times, frustrating process. Customers want to interact with staff who are professional, respectful of their time, are solution oriented as opposed to problem focused, and are helpful. From the top down, customers want a Development Services Program that is concerned about its customers' interests and acts accordingly.

In general, customers continued to hold very positive perceptions of Development Services staff with respect to their interest in serving customers' needs, their courtesy, and their helpfulness. This pattern was consistent across the three permitting stages, with permit counter, plan review and inspection staff all receiving very high marks. The vast majority of customers also perceived that the Partners care about their customers.

**WHERE SHOULD THE PARTNERS FOCUS ON IMPROVEMENT?** In the spirit of constant improvement, the study identified aspects of the Partners' performance that could be enhanced or improved—if only from the perspective of a minority of customers. The key areas of improvement are with respect to communication, consistency, accountability, and timeliness of performance. Although these areas were at the top of the list for improvement in 2006 and remain so for 2007, it should be noted that the Partners posted statistically significant improvements in each of the areas in the past year.

**Communication** There are many aspects of communication that appear to shape customers' perceptions of, and attitudes about, the Development Services Program. Customers desire communications that are clear, specific, thorough and correct. This applies to both staff-customer communications and communications between staff assigned to a project, as well as to verbal communications and written reports, comments and instructions. Customers also want regular communication (or at least the ability to obtain the information) regarding the status of projects as they move through the process. By communicating in this way, the Partners will enable customers to better navigate the submittal, review and inspection processes and avoid problems—such as late hits during plan review—that are costly in terms of time and money.

With respect to communication, customers generally recognize that the Partners are doing an admirable job in making information available to customers via the Development Services website, brochures, and meetings. Overall, approximately three-quarters of customers indicated that they were satisfied with the Partners' performance in this respect. Nevertheless, some customers desired that more information, tools and resources be made available online. Despite statistically significant improvements in various aspects of communication during the past year, improving the clarity of staff-customer communications, as well as improving inter- and intra-departmental communication on specific projects, were also viewed as priorities from the customers' perspective. It is worth noting that perceptions of staff's performance in communicating with customers or other staff members continue to be among the key factors that distinguished customers who were satisfied with the Partners' overall performance from those who were dissatisfied.

**Consistency** Customers desire a process that is fair and predictable, which requires consistency in both the structure and application of fees, rules, policies and procedures. Put simply, the same rules and procedures should apply to similar projects—they should not vary because of



the individual staff members assigned to accept, review or inspect a project or due to political concerns. Inconsistent (and subjective) interpretations of codes and regulations should be avoided. Consistency between Development Services staff across stages of the permitting process is also important to keep projects on track.

Although most customers gave the Partners positive reviews with respect to consistency, some noted that they received inconsistent comments and corrections during plan review, as well as conflicting instructions for a given project between plan review and inspection staff, or between different inspectors. Concern regarding consistency (and coordination between departments that impacts consistency) was particularly pronounced among discretionary customers and when customers were commenting on the plan review stage or projects that involved the Public Works Department. Setting and maintaining clear, consistent standards was among the top specific improvements sought by both ministerial and discretionary customers.

**Accountability** Customers want a Development Services Program that is accountable to them. So long as customers uphold their end of the deal, they feel that the Partners should uphold their end. This applies to processing projects according agreed-upon schedules, taking ownership of mistakes and fixing them in a proactive manner, and all types of decisions and actions.

The survey results indicate that this continues to be a priority area for improvement. Although most customers gave the Partners' positive reviews, a sizeable minority felt that the Partners often refuse to acknowledge a mistake they have made and/or do not do their best to fix the mistake. This pattern was especially pronounced among discretionary customers. Completing the plan review or plan check process by the target date set by the City was also consistently among the performance dimensions for which the Partners received the lowest satisfaction ratings. It is important to note, however, that the ability of the Partners to meet the original schedule is based, in part, on whether customers provide documents in a timely manner and the integrity of the plans they submit.

**Project Time Lines/Timeliness** The adage "time is money" applies in force to customers of the Development Services Program. Accordingly, customers want the Partners to prepare and adhere to reasonable and quantifiable time lines. Staff actions that delay projects—such as miscommunication, inconsistencies and late hits—are especially frustrating for customers, as are processes that are unnecessarily bureaucratic and time-consuming.

Although ministerial customers recognized statistically significant improvement in the Partners' performance with respect to wait times at the permit counter, the timing of plan correction requests, and completing plan review according to the agreed-upon target date, the study clearly indicates that customers would continue to appreciate anything the Partners' can do to further clarify and simplify the permitting process and thereby reduce the time it takes to complete their projects. This is especially true for discretionary customers during the plan review stage and those who have projects that require review by the Public Works Department. In addition to streamlining the process were possible, many of the suggested improvements noted above in the areas of communication, consistency, as well as accountability—if taken—will positively impact the efficiency and timeliness of the permitting process.